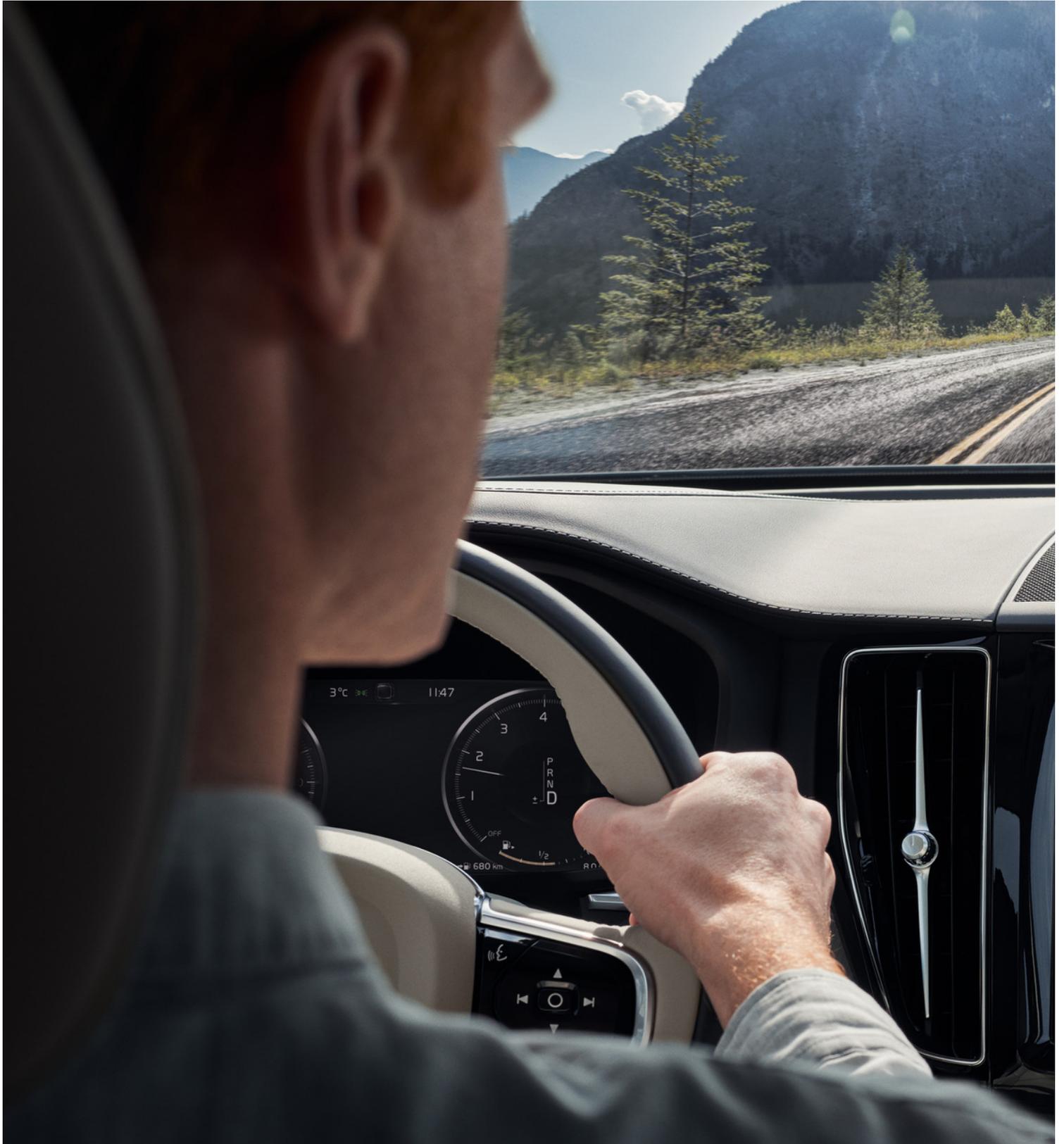




FINDING FOCUS ON THE ROAD





INTRODUCTION

Volvo Car USA has teamed up with The Harris Poll to deepen insights into the American opinion across four core themes: design, safety, technology and environment. These insights are distilled into “Volvo Reports” and will feature a different topic each month.

This edition of Volvo Reports focuses on distracted driving and explores the most prevalent distractions and the groups most prone to dangerous practices. The research further amplifies Volvo’s position as the global leader in vehicle safety. Through this report, Volvo sought to identify generational differences in unsafe driving practices and explore how to minimize distractions and refute common perceptions.

We encourage you to use these statistics freely, properly sourcing Volvo Car USA/The Harris Poll. If you have any questions regarding these findings, or would like to delve deeper into how Volvo is protecting all occupants in the event of an accident, please reach out to Jim Nichols at jim.nichols@volvocars.com

METHODOLOGY

This survey was conducted online within the United States by The Harris Poll on behalf of Volvo from June 5-7, 2018, with 2,035 U.S. adults ages 18 and older, among whom 1,665 drive a vehicle. A follow up study was conducted from June 19-21, 2018 among 2,015 U.S. adults ages 18 and older, among whom 1,894 are drivers, to better understand the role of voice commands in the vehicle. These online surveys are not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

THE DISTRACTION DILEMMA

In today's always-on culture, distractions are on the rise – and especially true among younger Gen Zs, more than half of whom say their level of distraction is impacting focus and productivity:

- 51% say it's harder for them to focus on a single task now than it was 5 years ago
- 54% say that it's harder to get things done because they get distracted easily
- 63% admit they sometimes get so distracted they forget what they were trying to do

Beyond forgetfulness, the rise of constant distraction overload is creating anxiety for most Americans – and in particular, Gen Zs. While 59% of Americans say they feel anxious when they have too much to do, this number rises to 77% among Gen Zs.

As a result, many are looking to regain control of the incessant interruptions. 64% of Americans say they are actively trying to minimize distractions, and the top place they're looking to do so is on the road. Cars are a top source of solace, with "driving in silence" being the number one action taken overall to minimize distractions (33%).

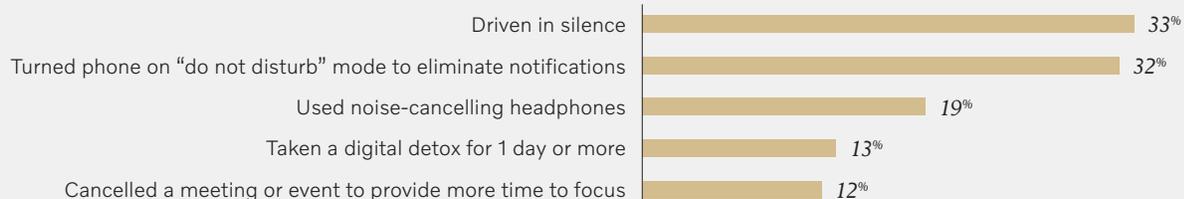
Younger Gen Zs, 89% of whom are trying to minimize distractions in their daily lives, are particularly likely to seek a reprieve from technology by turning their phones onto "do not disturb" mode (58%), using noise-cancelling headphones (32%) or taking a digital detox by unplugging from technology for one day or more (23%).



"I FEEL ANXIOUS WHEN I HAVE TOO MUCH TO DO."



ACTIONS TAKEN TO MINIMIZE DISTRACTIONS



DISTRACTED DRIVING: THE CULPRITS AREN'T WHO YOU THINK

The increasing distractions impacting Americans across all areas of their lives are particularly acute on the road. 90% say there are more distractions driving today than there were five years ago. In fact, they do not list speeding, driving under the influence or driving aggressively as the number one threat to safety on the road. They list driving distracted (55%).

TOP THREAT TO SAFETY ON THE ROAD

55%

Driving distracted

31%

Driving under the influence
of alcohol or drugs

8%

Driving aggressively (e.g.,
road rage)

3%

Driving over the speed limit

One of the top sources of distraction behind the wheel is driving while worried, an activity 92% of Americans admit to doing, further indicating the rise of anxiety in a distracted society. In fact, one-third (33%) say they are “always” or “often” worried behind the wheel. Many are also pushing the boundaries of drowsiness on the road: four in five (82%) admit to driving while tired.

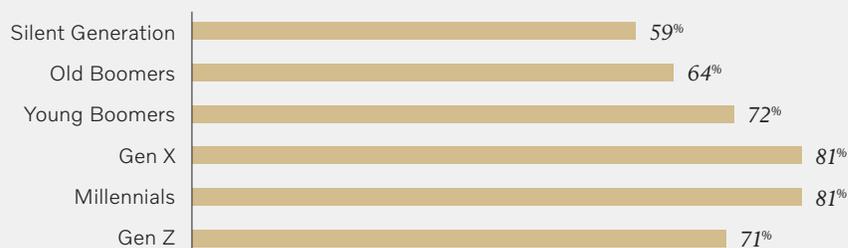
Not surprisingly, phones are another primary culprit causing drivers to lose focus. Drivers identify using a phone as the number one distraction behind the wheel (43%), far surpassing children (11%), other passengers (9%), and changing the GPS (8%) or music (5%).

What is surprising though is the group who uses their phones the most behind the wheel. Despite identifying higher levels of distraction overall, Gen Zs report being more likely to focus on the road than their parents. Gen X and millennial drivers are the most likely to say they use their phones behind the wheel (81%), while Gen Z drivers fall more even with Young Boomers (71% and 72%, respectively).

In fact, parents with children under 18 in the household are among the most likely to use their phones while driving, whether they are at a stoplight (95%, compared to 90% overall), driving alone (87%, compared to 80%) or driving with a passenger (75%, compared to 66%). Even more surprising, the situation in which parents are most likely to surpass the general public in using their phones while driving is when they have their kids in the car (62%, compared to 38% overall). For some, this is not only an infrequent, emergency-based need: one-third (32%) admit they often use their phone while driving with kids.

Beyond their own phone use behind the wheel, Americans are even more likely to say other drivers are the culprits than themselves. For example, 92% say they think other drivers post on social media on the road, but only 23% report doing so themselves – a 69% gap.

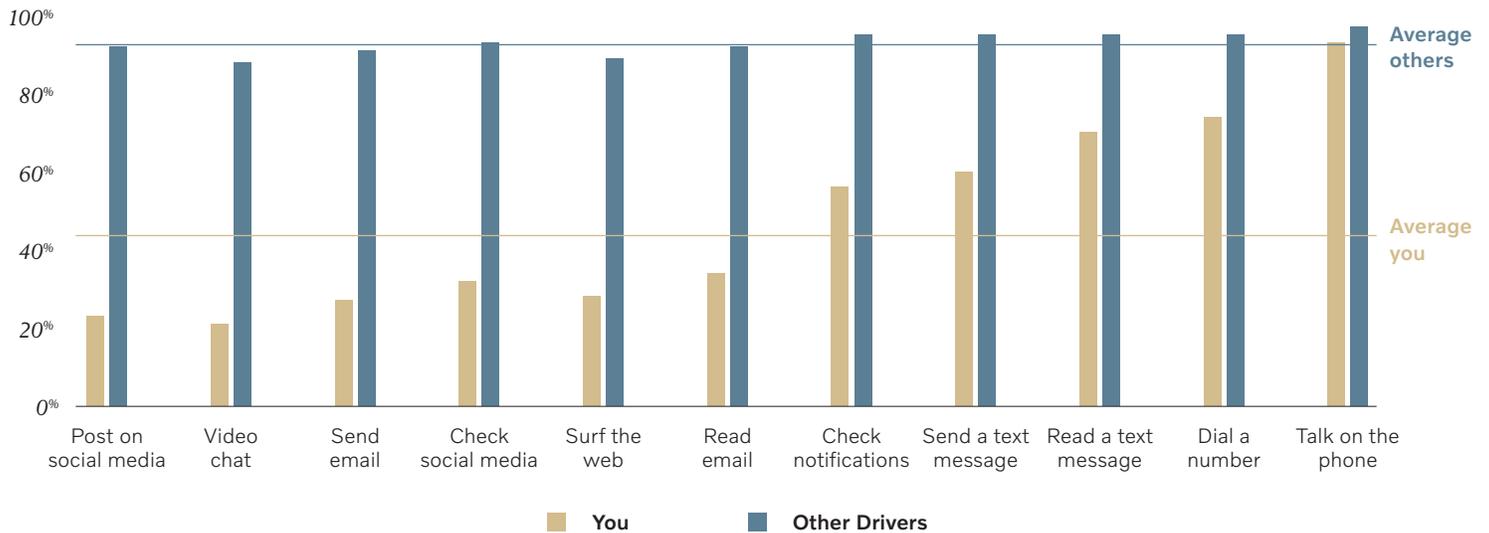
USE A CELL PHONE WHILE DRIVING



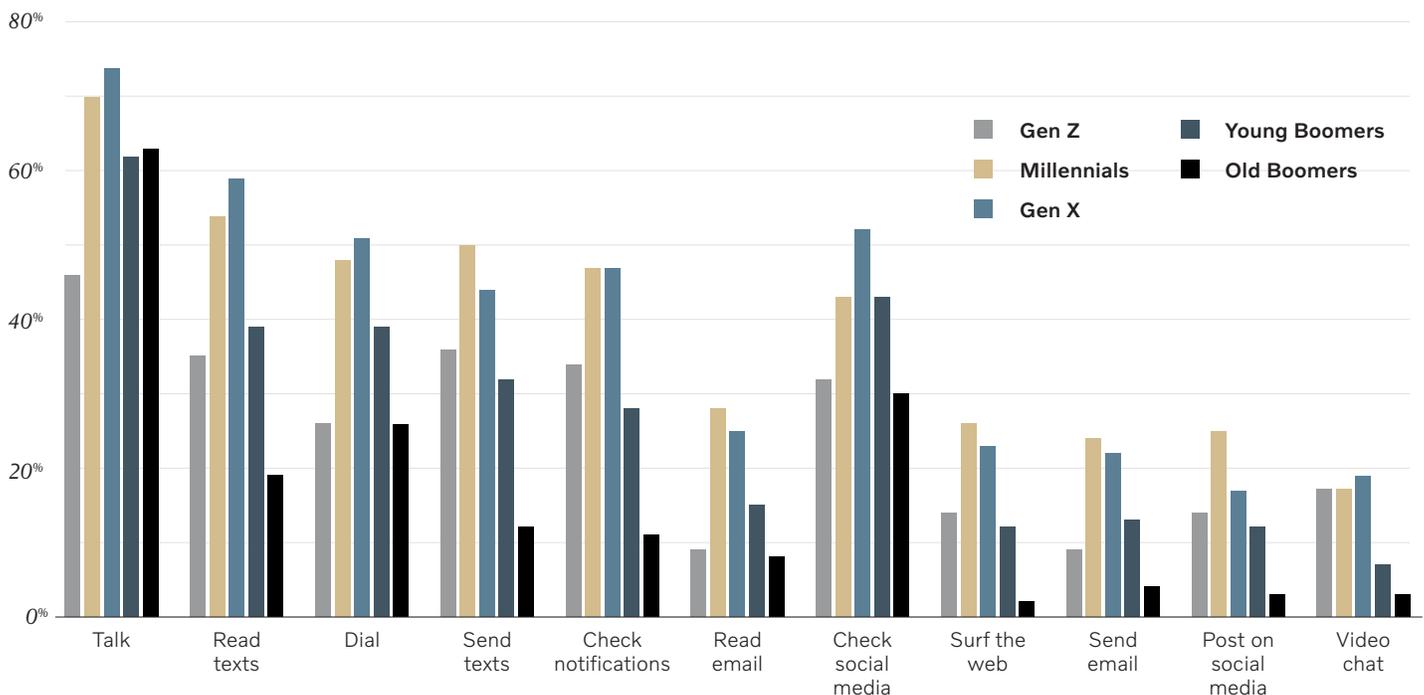
WHAT DISTRACTS DRIVERS MOST?

The majority of Americans (71%) admit they use their phones while driving, mostly to talk (93%) and dial (74%). But over half of Americans say they engage in activities that take their eyes off the road for even longer, like sending texts (60%) and checking notifications (56%), while one in four say they video chat while driving (22%). Two-thirds (66%) don't let their phones out of sight while driving, keeping them in arm's reach.

AMERICANS ARE MORE LIKELY TO PERCEIVE OTHERS AS DISTRACTED DRIVERS



GEN X AND MILLENNIALS ARE MORE LIKELY TO USE THEIR PHONES WHILE DRIVING THAN YOUNGER GEN Z'S



CRAVING CONTROL IN THEIR CARS

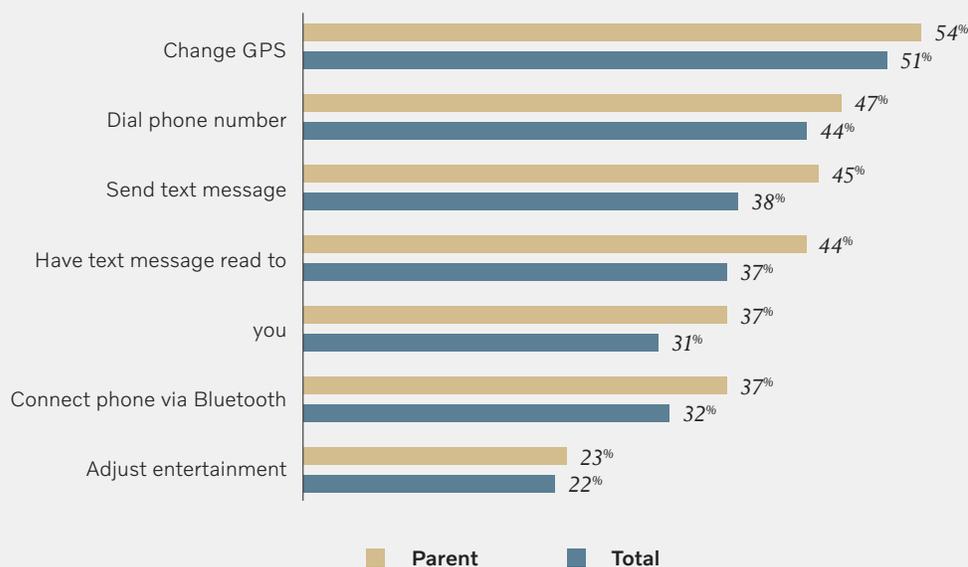
As distractions behind the wheel increase, Americans are looking for help to minimize and control them. For many, it's an issue of education and engineering. The vast majority agree that we need better education around the impact of distracted driving (89%), and that vehicle manufacturers should do more to minimize distractions in the car (81%). 74% say they would even pay more for a vehicle with built-in features to correct or prevent distractions on the road.

Many are looking for ways to streamline their use of technology – and phones in particular – behind the wheel. Half of Americans say they turn off notifications or use the “do not disturb” feature on their mobile device when driving to minimize distractions (51%). Among Gen Z, this number rises to 61%. In fact, when asked what vehicle features would help drivers feel less distracted behind the wheel, the top response was a “do not disturb” function to disable calls and texts while driving (36%).

Others are looking to increase safety behind the wheel by using voice commands, which allow drivers to keep their eyes on the road. The vast majority agree that it's safer for drivers to use voice commands to activate or control their vehicle's features, rather than manually doing so (84%). Three in four say the roads would be much safer if all vehicles had voice command capabilities (75%) and that they expect to use the technology more in the next five years than they do now (74%).

When it comes to specific applications, more than half say they would use voice command technology for the navigation or GPS (51%). Parents in particular see the value in using voice commands to minimize distractions from their phones – they are at least 10% more likely than non-parents to say they would use voice commands to dial, send texts, have texts read to them and connect their phones to the car via Bluetooth.

WOULD USE VOICE COMMANDS IF THE TECHNOLOGY WAS EASY TO USE



VOLVO TAKES ON DISTRACTED DRIVING

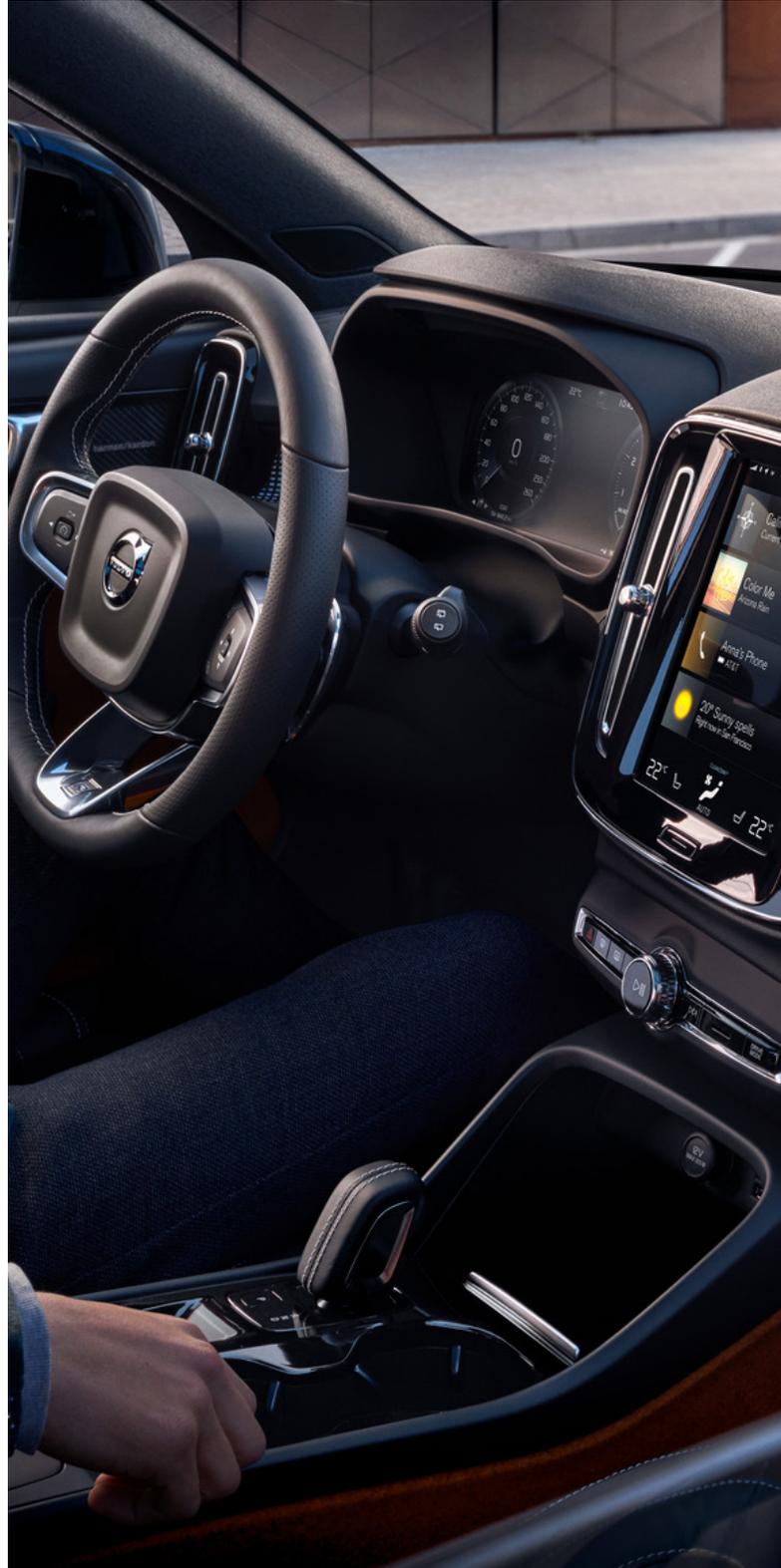
Distracted driving is a critical issue for all generations, with studies* showing it remains a major cause of motor vehicle accidents across the country. Volvo, the longtime leader in vehicle safety, is committed to reducing crashes by integrating category-leading features across design, safety and comfort intended to reduce distraction and protect drivers and others on the road.

DESIGN

Stemming from its Scandinavian design heritage, Volvo's "Now and Whenever" philosophy keeps information essential to driving accessible and visible without having to take your eyes off the road. Thus, less vital features are found within the controls – keeping drivers more focused on reaching their destination.

The "now" components include innovation in dashboard display design and an available heads up display (HUD) directly in front of the driver, plus simple steering wheel controls to ensure drivers can keep eyes forward and make essential adjustments in real-time. Volvo vehicles also include voice command capabilities and Bluetooth integration, allowing for hands-free control and communication for items such as HVAC, navigation, phone and changing radio stations.

For the "whenever" portion of this philosophy, Volvo's Sensus Connect system uses a tablet-like touchscreen, complete with a physical "home" button, and a four-tiled interface that enlarges – but does not remove – functions being used. To ensure easy access, drivers can customize the position of touchscreen buttons to best meet their preferences. Because of the use of a touchscreen instead of hard buttons, Volvo is able to update vehicle features after the time of purchase.



SAFETY

Volvo's founders said, "Cars are driven by people – the guiding principle behind everything we make at Volvo, therefore, is and must remain, safety." This statement continues to ring true, with safety firmly entrenched in Volvo's culture, highlighted by the automaker's commitment to a vision that no one should be killed or seriously injured in a new Volvo by 2020.

Nearly 60 years ago, Volvo revolutionized the industry with the introduction of the three-point safety belt – a lasting innovation and patent that the automaker willingly opened to other manufacturers, calculating that saving lives would outweigh potential profits from the design. The innovation stands the test of time and remains a key component to keeping riders restrained while driving. Other Volvo safety innovations over the years include Side Impact Protection System (SIPS), whiplash protection and Rollover Protection Systems (ROPS).

More recently, Volvo has introduced new active and passive technologies that provide extra layers of safety to combat distracted driving. Volvo's City Safety with collision warning helps caution drivers of pedestrians, cyclists, large animals, and other vehicles that may emerge in front of a car without warning. The system will alert the driver with a visual and audible alert and automatically brake if they cannot respond quickly enough. Driver Alert detects drowsy or inattentive driving and recommends a break to ensure drivers are focused on the road. Other standard features, like Lane Keeping Aid, Run Off Road Protection and more, combine to help prevent or mitigate accidents on the road.

Additionally, with more Americans than ever considering their pets part of the family, Volvo is one of the only auto manufacturers to offer its own set of pet safety accessories – including a dog harness, dog gate and protective steel grille – that tie directly into the safety system of the car. In addition to putting them and yourself at risk in the event of an accident, pets roaming around a vehicle can be a dangerous distraction for drivers, so Volvo's pet offerings help keep pets restrained and comfortable on any road trip. For more information on Volvo's pet safety offerings, please visit www.volvocarspets.com.

COMFORT AND CLUTTER

Volvo aims to ensure maximum comfort for both drivers and passengers. Ergonomically designed seats are included in every model, building on insights from orthopedists to help find the ideal balance of luxury and safety. When drivers are comfortable in their seat, they remain in the ideal position to allow Volvo's in-car safety system to operate optimally. New storage solutions, such as those in Volvo's XC40 compact SUV, also help minimize distractions by reducing clutter, providing more practical organization, and keeping items more securely in place while driving.

Volvo remains committed to providing solutions across technology, design and safety that will help reduce potentially dangerous distractions when traveling.

*[NHTSA - Distracted Driving Study \(2015\)](#).

